

Project Management: Roles & Responsibilities
Presented to: Elgin 2010
By Rural Development Initiatives, Inc.
January 13, 1997

Training Workshop Notes

I. Welcome, Introductions, Agenda Review

Mary Rose Nichols, Chairperson of Elgin 2010, welcomed the workshop participants (team). These were: Joe Garlitz, Ed Botz, Mary Rose Nichols, Ron Brand, Kevin Cooper, Ray McVey, Vanetta McVey, Jesse McDonald, Jennie Tucker. Treva Hunter, the RDI lead trainer for this workshop, was introduced to the group, as was Constance Albrecht, the eastside field coordinator from RDI.

The agenda for the session was as follows:

- II. Overview of Project Management
- III. Review Workshop Objectives and Outcomes
- IV. Vision for the Project
- V. Why Agreement is Needed Around Roles and Responsibilities
- VI. Major Players in the Project
- VII. Review of Six Key Project Management Areas
- VIII. Building Agreement in 6 Key Areas
- IX. Recommendation and Action Assignments
- X. Evaluation of Workshop

II. Overview of Project Management

Hunter distributed the Workbook for use in the session to all the team and left four extra workbooks for Elgin 2010's future use. She stressed that although the information in the workbook is for use at this training, it was designed so that it may also be used by the group on other projects. She presented the information from page 2 of the workbook, an overview of Project Management, in order to give the participants a definition of project management and an understanding of its major phases.

The team then reviewed the current status of the Hunaha Park project in terms of the four primary phases of project management:

- I. Definition--Done!
- II. Planning--Now underway (includes design and engineering)
- III. Implementation--Construction of Park
- IV. Completion--Operation of Park

III. Review Workshop Objectives and Outcomes

Hunter then reviewed the workshop objectives and its expected outcomes with the group. They were as follows:

Workshop Objectives:

- Identify why agreement is needed on roles.
- Describe 6 key areas of project management.
- Analyze 6 key areas re: Hunaha Park Project.
- Spell out terms under which parties will work.
- Gain knowledge to use in other future Elgin 2010 projects.

Expected Workshop Outcomes:

- Affirm Agreement on project vision and components.
- Agreement on important roles - who will do what!
- Define responsibilities for project players
- Agreement on accountability, authority, reporting, etc.
- Action plan to move the project forward by defining roles.
- Outline for a memorandum of understanding(MOU) among project players.
- Follow-up work with RDI if needed (provided for in MOU between RDI and Elgin 2010)

IV. Vision for the Hunaha Park Project

The participants reviewed with Albrecht a draft vision of the park project to make sure the team members all had the same understanding of the project. (This was a good exercise to help focus the team's efforts on their project.)

The following was agreed to as the park vision:

Hunaha Park will be a self-sustaining community recreational and tourist development facility that will contribute to community and economic development for the area. It will be owned by the City of Elgin and will include:

**RV and tent campground (1st priority)
Day use area
Restrooms and shower
Raft launch area
Interpretative trails/stations**

Albrecht stated that the workshop focuses on the following portions, essentially the planning phase, of the Hunaha Park Project:

Phase 1--Environmental assessment, soils work, title, permits, etc.

Phase 2--Engineering design of utilities, roads, buildings, and design of landscaping, campground, etc.

Phase 3--Hire contractors for: project management, engineering and related design work, and fundraising for construction.

V. Why do We Need Agreement around Roles and Responsibilities:

Using worksheet #3 from the workbook, the team wrote down examples of problems that had emerged in the past when there was not clarity around roles in a project. The team then shared their examples, as follows:

- Roles were clarified but misunderstood, i.e. people didn't understand how much time it would take to do some task they had agreed to
- Timelines not followed and what was done was not what had been agreed to because instructions were not clear enough.
- Need to learn to be good consumers of contractual services.
- Need deadlines and written agreements to avoid disagreements.
- No clearly established hierarchy of authority or a key contact person.
- Committee had difficulty dealing with landscape architect (contractor) because the committee wasn't clear on responsibility of city and Elgin 2010.
- Either not enough people to work on project or too many chiefs and/or sometimes one person wants to do everything.
- Even though there was an architect to work on project (community center) there was no one person overseeing the quality of the work (project management).
- Expectation or assumption that "they", i.e. someone else, was doing the planning.
- Problems when things weren't done; opportunities were lost, for example, for funding.

VI. Identifying Major Players in the Project

The team listed on Worksheet #4 in the workbook the major players in the park project and who they represent. The list included:

City Council
Elgin 2010 Committee
Hunaha Park Project Team
Other Parties

The group reviewed individual participants' lists and the following things were agreed to:

City Council

- The Council has the final responsibility of the project since the City is the grant recipient.
- Since Kevin Cooper is both a Council member and Elgin 2010 team member he would be an ideal liaison on this project between both groups. He agreed to serve in this capacity.

To do: Ask City Council to appoint Kevin Cooper as liaison. Elgin 2010 Chair Mary Rose will present to Council the results of the workshop and ask them to appoint Cooper as the liaison at the Council meeting on January 14.

Elgin 2010 Committee

- The Elgin 2010 Committee would not all need to be on the park project team. Membership and responsibilities for Elgin 2010 are as follows:

Mary Rose-chair
Ron Brand-treasurer
Jessie-secretary
Ray-assistant treasurer
Other members: Kevin, Joe, Vanetta, LaVeta, Ed Pat, Beth, Maureen, Olga

Hunaha Park Project Team

- It was agreed the following people would be on the team and who they represent:

City: Joe Garlitz & Kevin Cooper

Other Elgin 2010 members: Vanetta and Ray McVey, LaVeta Botz

Funders: Donna Betts, Northeast Oregon Economic Development District, (NEOEDD) and Judy Wing, Forest Service

Others Participating Organizations: Yuki Gleason, Elgin High School

Project Manager: hired position

Other Parties

- The group also discussed other important players in the project, but felt it would be most appropriate that they get send copies of meeting reports and updates, but not necessarily be part of the project team. The list included:

Contractor(s): engineers, etc.(send copies of meeting reports and updates)

County Commissioners

Others: Technical Team/Information Sharing (send community meeting press release) to student (wildflower plant group); local businesses; adjacent property owners to park; master gardeners program, ODOT; DEQ; Good Sam Club

VII. Review of Six Key Project Management Areas for the Project

Hunter reviewed the six key project management areas from pages 7 and 8 in the workbook.

VIII. Building Agreement in 6 Key Areas

Hunter explained that the next step would be for the team to break into two groups, with each group working through three of the key project management areas which she just reviewed, and developing recommendations to report back to the full group.

Albrecht worked with Joe, Kevin, Vanetta, and Jennie in the three areas of Accountability, Authority, and Responsibilities and Support.

Hunter worked with Ray, Mary Rose, Ed and Jessie in the three areas of Reporting and Communication, How to Handle Conflicts, and Evaluation.

The two groups used the worksheets in the workshop handbook. They discussed their recommendations and reported them back to the full team. The following are the recommendations agreed upon by the full team (the numbers preceding these topics are the worksheet numbers in the training handbook):

#5 Accountability

- Who's answerable for satisfactory completion of entire project?

City--ultimate grantee
Elgin 2010 Committee
Project Team
Project Manager
Contractors

- Who's answerable for specific assignments within project?

In contracts--the Contractors
Project Team--Memorandum of Understanding between the City and Committee spells out duties

- What are the standards against which the success of the project will be judged?

Completion of project construction: a) within budget, b) in time frame, c) meets codes, rules and specifications. **Result is a Quality Project!**

#6 Authority

- What is formal power of Elgin 2010 Committee?

City made a motion appointing committee its economic development and strategic team, advisory board

- How much power granted to the project team and manager?

City made motion giving committee approval of grant application for state Rural Investment Fund for project

- How broad is the authority?

What needs to be done? Ask for Memorandum of Understanding with City Council for the purpose of granting the Committee authority for the administrative, legal, financial, planning portions of the project.

#7 Responsibilities and Support

- Who develops the needed revision of the project plan (i.e. revise conceptual design, big picture, time frames)?

Project Team

- Who develops roles and responsibilities?

Elgin 2010 Committee, defined in MOU

- Who does job/contractor descriptions, including project manager?

Joe and Kevin do it, with Constance reviewing it

- What resources (current grants) are available to project team and/or project manager?

Revise budget along with job description

Also need to document in-kind contributions; Hunter shared that RDI is using a form they created for tracking in-kind contributions by volunteers in their Strategy Linking Project. Albrecht said she would share that form with Elgin 2010 for their use as a model.

- Have other organizations/individuals been asked for assistance?

School may assist with the environmental assessment; Good Sam RV Club and Watershed Council could be approached, too.

- Who handles administrative, clerical and secretarial duties?

Joe--some fiscal & secretarial assistance from city (in kind services) put in MOU
Project manager--writes up reports
Project Team--does meeting notes and makes sure they are transmitted to the city

- Who will pay for the above support?

See item directly above

- Is this support covered by the project? In-kind contributions or in the budget?

USFS or other resources (?)

- Has the Board made promises or obligations that should be known?

Currently the Committee has a verbal commitment with the School for natural resources/environmental work on project; need to follow-up with letter of agreement

- Another consideration is public relations--contacting the adjacent landowners again--need to decide how and when.

#8 Reporting and Communication

- When should the Elgin 2010 Committee have the project manager (and the City Council) and/or team consult with the Committee during the project?

The project should do monthly written reports with the project team minutes attached, schedule with deadlines. Share what's working as well as what's not working or problems.

- To whom will the team and manager report? How often? In what form?

Team should keep minutes of each meeting and have them available if Committee/City Council want to review.

- To whom will the Council report?

City Council--written, oral, or both?

TO DO--Ask the City Council what type of communication they want.

- Who else needs information on the project? (Is there anyone who shouldn't get information?)

Do a brief update and send out each month to:

Union County Commissioners
 U.S. Forest Service--Judy Wing
 Northeast Oregon Economic Development District--Lisa Lang
 Newspapers
 Schools--biology class
 Adjacent property owners and along street
 Master gardener program and native plant society

#9 How to Handle Conflicts

- What is the Committee's role in resolving problems?

Mediation
 Problem solving
 Facilitate good communication

- Methods for problem solving

Problem solving chart (handout)
 Nominal group process (handout)
 Dialog with folks-direct communication

- What's the Board's role in supporting the project team and/or project manager?

Following the MOU on communication, roles and responsibilities, etc.
 Hear progress reports-give feedback
 Evaluate progress
 Problem solve with team and/or project manager
 Share information with community at large
 Link Park Project with other groups like Good Sam Club

#10 Evaluation

- How will the Board evaluate the project? How will it use evaluation information?

Success indicators:

Grants obtained.
 Project budget on track.
 Secure permits.
 Environmental assessment completed and approved.
 Engineering design work done and approved.
 Landscape design completed and approved.

On-going reports using the success indicators will be given to the City Council, grantors and public

- Who prepares final report? Who approves it?

Project Manager drafts
 Project Team reviews
 Elgin 2010 approves and recommends to City Council
 City Council final approval and submitted to grantors

IX. Recommendations and Assignments

Following the agreements reached on the six key areas of project management as documented above, the Elgin 2010 team reviewed the assignments needed to accomplish those agreements:

Elgin 2010 Committee Work

- 1) Have City appoint Kevin Cooper as liaison to Committee
(Mary Rose Nichols will do on Tuesday, 1/14 at City Council)
- 2) Contact Yuki Gleason at School re: get her reports and copy of grant applications; ask is she willing to be on project team? (Vanetta McVey will contact her)
- 3) City Council--letter
Ask them to inform how often they want reports from Elgin 2010.
- 4) Elgin 2010 needs to finalize by-laws and may need to establish 501(c)(3) status.
- 5) Review the monthly reports submitted to them by the project team and provide feedback, including on the draft of the MOU between the City and Elgin 2010, the workplan, etc.

Project Team Work

- 1) Convene team meetings (Joe Garlitz)
- 2) Draft description on RFP/RFQ for project manager. (Kevin Cooper and Joe Garlitz, Constance Albrecht reviews)
- 3) Draft MOU between 2010 and City. (Whole team?)
- 4) Draft Letter of Agreement between Elgin 2010 and School (pg. 6 of these notes) (project team)
- 5) Develop workplan time frame. (Joe Garlitz and Kevin Cooper)
- 6) Revise plan and budget for NEODD contract by 1/30/97. (Joe Garlitz and Kevin Cooper)
- 7) Revise conceptual design. (Ron Brand, Joe Garlitz, Ray McVey and Ed Botz)
- 8) Develop a PR plan of action (project team)
- 9) Project Team and Elgin 2010 develop their first monthly reports as agreed at the workshop; may even want to include the workshop notes.
- 10) Contact other team members. (Vanetta McVey)
- 11) Contact "others."
- 12) Albrecht will provide a sample form for recording in-kind contributions (Constance Albrecht)

X. Evaluation of Workshop and Adjournment

After thanking the Elgin 2010 team for their participation and interest at the session, and expressing a hope that the material covered will be of value, and after wishing the Elgin 2010 the best on the Park Project, Hunter requested the participants fill out a brief evaluation of the training. Albrecht also thanked the team for their dedication and hard work at the workshop.

The following is the results of the evaluation on the Elgin Hunaha Park Project Management Training as rated by the workshop participants.

1. On a scale of 1 to 5, how would you rate the training as an experience to help clarify and build consensus about the roles and responsibilities of your Hunaha Park Project?

average 4.375 (five 4s, three 5s)

Comments:

- very good
- good format - very outcome oriented. may have left some of us behind at times

2. On a scale of 1 to 5, how would you rate the training in terms of how well it worked to help you develop local *capacity* to effectively implement the park project?

average 3.875 (two 3s, five 4s, one 5)

Comments:

- we need more on community organization to get more people interested and involved
- covered a lot of "unplowed" ground we needed to address

3. On a scale of 1 to 5, how would you rate the trainers?

Treva Hunter average 4.8 (one 4, one 4.5, six 5s)

Constance Albrecht average 4.8 (one 4, one 4.5, six 5s)

Comments:

- both did an excellent job keeping the group on track
- workshops like this really help me because I have not had to use these terms and descriptions - different lines of thought

4. How committed are you personally to ensuring that the agreements made at the training are implemented?

all 8 respondents answered "very committed"

5. A. Which part of the training did you like best and why?

- all of it - both were very knowledgeable of what they were teaching
- outlining the chain of authority in the context of the project; we've discussed this several times and arrived at a "chicken and egg" scenario
- the ability to discuss the issues together and to decide on them together
- practical applications - emphasis on MOUs and accountability
- summation after working through solutions
- what needs to be done first, second, third, etc.

B. Which part did you like least and why?

- all was interesting • coffee was bad - very bad
- to me every item was well covered • I liked it all • all is helpful

C. What suggestions do you have for improving any part of the training?

- the agenda was aggressive in terms of time. might want to send out overview & other page in advance to save time - I wouldn't cut anything out!
- all items were covered well • more time
- a lot of information in too short a time; maybe 4 hours rather than 3